



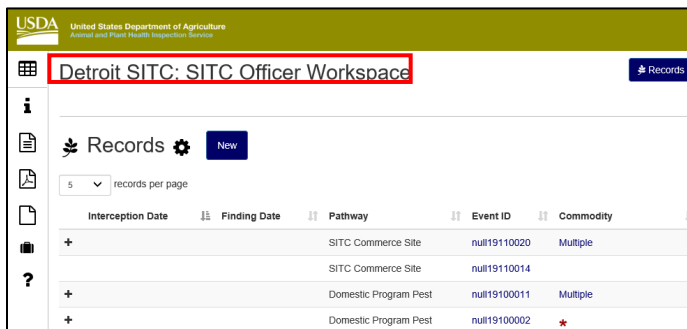
User Guide: Entering Data for Record Information Page in SITC ARM Workspace

Purpose: This user guide describes how to access and enter information on the Record Information page. The following areas (with the corresponding number on the image) are covered in this user guide:


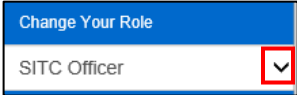
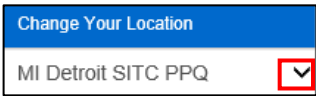
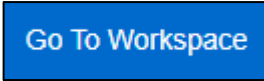
1. Create a New Record
 - a. Using an Existing Record
2. Add Record Information
3. Access a Created Record

1. Create a New Record

ARM is a permission and rules-based system. Some users might have access to different workspaces and might have multiple active roles and locations in ARM. Before creating a new record, users must check if they are in the correct workspace. After logging into ARM, refer to the screenshot below on the SITC Workspace.

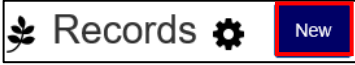
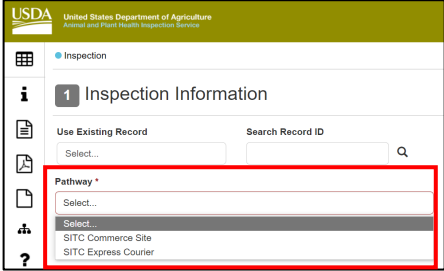
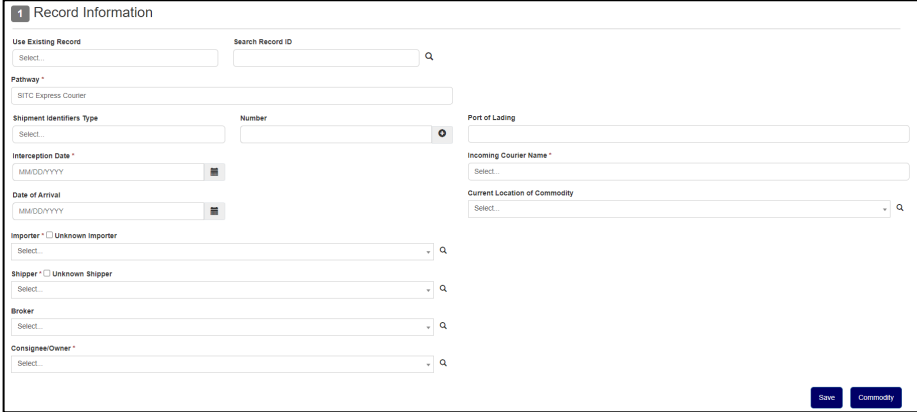


For the SITC Workspace, users will see their city location and role on the top left side of the workspace page. If a user has multiple roles and locations and doesn't see this information on the screen, refer to the table below for switching roles and locations.

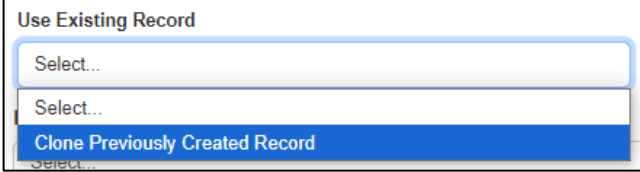


Step	Action
1	<p>Click on the User Profile Icon.</p>  <p>The user profile icon is on the top right side of the workspace.</p>
2	<p>Select SITC Role on the “Change Your Role” field using the dropdown arrow.</p> 
3	<p>Select SITC Location on the “Change Your Location” field using the dropdown arrow.</p> 
4	<p>Click on “Go to Workspace”.</p> 

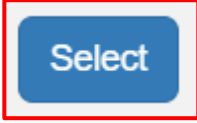
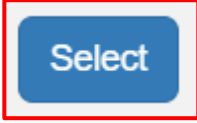
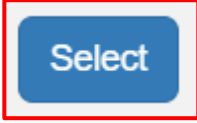
Note: ARM will redirect you to the SITC Workspace.

Once you validate being in the correct workspace; refer to the table below on how to enter a new record in the SITC workspace.


Step	Action						
1	<p>Click on the New tab.</p> 						
2	<p>Determine if using an existing record.</p> <table border="1" data-bbox="297 562 1333 888"> <thead> <tr> <th data-bbox="297 562 784 625">IF:</th> <th data-bbox="784 562 1333 625">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="297 625 784 772">Using an Existing Record</td> <td data-bbox="784 625 1333 772">GO TO Topic a. Using an Existing Record.</td> </tr> <tr> <td data-bbox="297 772 784 888">Not using an Existing Record</td> <td data-bbox="784 772 1333 888">GO TO step 3.</td> </tr> </tbody> </table>	IF:	THEN:	Using an Existing Record	GO TO Topic a. Using an Existing Record.	Not using an Existing Record	GO TO step 3.
IF:	THEN:						
Using an Existing Record	GO TO Topic a. Using an Existing Record.						
Not using an Existing Record	GO TO step 3.						
3	<p>Select the Pathway.</p>  <p>Note: After selecting a Pathway, the screen will refresh to show the Record Information Page.</p> 						
4	<p>Go to Section 2. Add Record Information.</p>						

a. Using an Existing Record

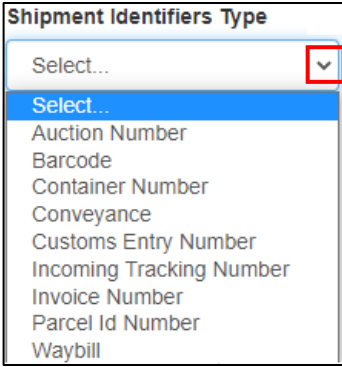

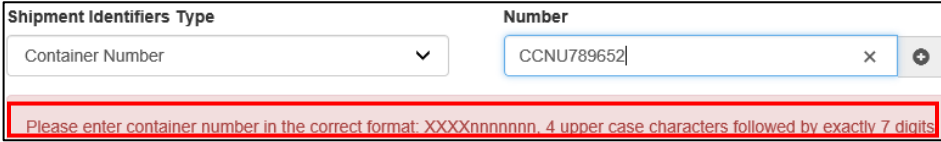
Step	Action
1	<p>Select “Clone Previously Created Record” from the dropdown.</p> 
2	<p>Enter the Record ID, then click search.</p>  <p>Note: A new dialog box summarizing the data entered in the record the user wants to clone will appear. The user also has the option to click “Copy article data” to pull the article data from the previous record being cloned. This does not mean that all data will populate in ARM.</p> 

3	<p>Review the data in the window.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="text-align: left; padding: 5px;">IF DATA IS</th> <th style="text-align: left; padding: 5px;">THEN</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px; vertical-align: top;">Correct</td> <td style="padding: 5px; vertical-align: top;"> <ol style="list-style-type: none"> 1. Click on Select. <div style="text-align: center; margin: 10px 0;">  </div> <p>Note: ARM will reload and the data that appeared in the dialog box will load into the sections in ARM.</p> <ol style="list-style-type: none"> 2. GO to Section 2. </td> </tr> <tr> <td style="padding: 5px; vertical-align: top;"><u>Not</u> correct</td> <td style="padding: 5px; vertical-align: top;"> <ol style="list-style-type: none"> 1. Click on Cancel. 2. Repeat Steps 1 to 3. <p>Note: Review the existing record and/or use another one if needed.</p> </td> </tr> </tbody> </table> <p>Note: You will need to review and validate the transferred data in the Inspection Information Section. If you don't need the article data from the previous record, you can uncheck the "Copy article data" box.</p>	IF DATA IS	THEN	Correct	<ol style="list-style-type: none"> 1. Click on Select. <div style="text-align: center; margin: 10px 0;">  </div> <p>Note: ARM will reload and the data that appeared in the dialog box will load into the sections in ARM.</p> <ol style="list-style-type: none"> 2. GO to Section 2. 	<u>Not</u> correct	<ol style="list-style-type: none"> 1. Click on Cancel. 2. Repeat Steps 1 to 3. <p>Note: Review the existing record and/or use another one if needed.</p>
IF DATA IS	THEN						
Correct	<ol style="list-style-type: none"> 1. Click on Select. <div style="text-align: center; margin: 10px 0;">  </div> <p>Note: ARM will reload and the data that appeared in the dialog box will load into the sections in ARM.</p> <ol style="list-style-type: none"> 2. GO to Section 2. 						
<u>Not</u> correct	<ol style="list-style-type: none"> 1. Click on Cancel. 2. Repeat Steps 1 to 3. <p>Note: Review the existing record and/or use another one if needed.</p>						

2. Add Record Information

All required fields on the Record Information page will be identified with a red asterisk . It is recommended to complete as many fields as possible, even though some of those fields are not required. Remember, ARM is a workflow-based system. Once data has been entered on one page, it will be auto-populated on subsequent pages if needed. Users will not have to enter it again.

To enter data into the Record Information page, refer to the table below.

Step	Action
1	<p>Click on the dropdown arrow and select a Shipment Identifier Type.</p>  <p>Note: Shipment Identifiers could vary per pathway. This is a non-required field. SKIP this step if needed.</p>
2	<p>Enter the Shipment Identifier number. Click on the plus sign.</p>  <p>Note: This is a non-required field. SKIP this step if needed. Some Shipment Identifier Numbers might have a specific format. If so, a warning message will show with the correct format. See example below:</p>  <p>Note: Repeat Steps 1 and 2, as needed, if you want to add multiple shipment identifiers.</p>

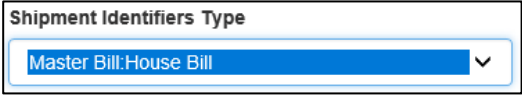



If users enter only one identifier, ARM provides an auto-save capability when users click on the Save or Commodity tabs on the far low left side of the page.


Some Shipment identifiers have a unique format. These are the different formats for the most used shipment identifiers in ARM:

- 1- **Simple Bill (Airway bill/Bill of Lading)- xxx-nnnn** 3 alphanumeric digits followed by a dash (-) and at least 4 alphanumeric digits. This can vary depending on the selected pathway.
Example: On a Sea Cargo Shipment, the format will be 4 alphanumeric digits followed by a dash (-) and at least 4 alphanumeric digits: **xxxx-nnnn**.
- 2- **Customs Entry Number- xxx-nnnnnnnn** 3 alphanumeric digits followed by a dash (-) and 8 alphanumeric digits.
- 3- **Container Number- XXXXnnnnnnn**, 4 upper case characters followed by exactly 7 digits. No hyphen (-) in between.
- 4- **Master Bill: House Bill- xxx-nnnn** 3 alphanumeric digits followed by a dash (-) and 4 alphanumeric digits. This can vary depending on the selected pathway.
Example: On a Sea Cargo Shipment, the format will be 4 alphanumeric digits followed by a dash (-) and at least 4 alphanumeric digits: **xxxx-nnnn**.

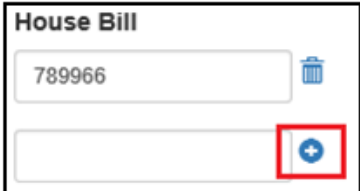
Refer to the table below for special instructions on how to enter a Master Bill: House Bill in ARM.


Step	Action
1	Select Master Bill: House Bill Shipment identifier. 
2	Enter the number following the format previously provided. Click on the plus icon. 

3 Type the House bill number and then click on the plus icon.

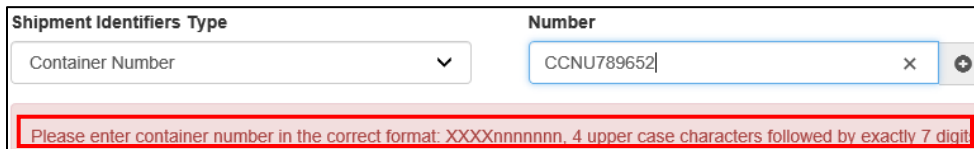


Note: Repeat this step for any other House bills to be entered if needed.



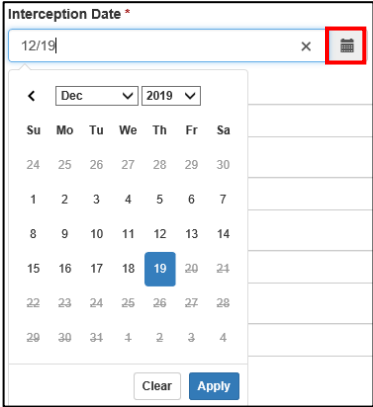

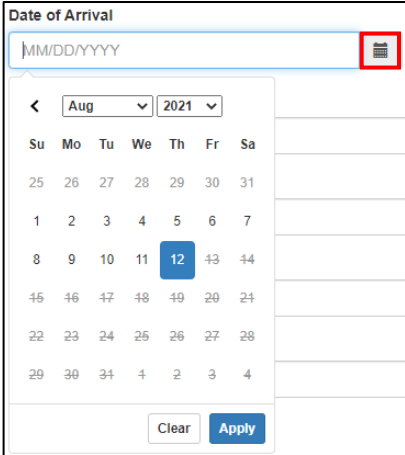
To delete a shipment identifier or a House bill number, click on the trash can  icon near them.

If one of these Shipment Identifiers is entered using an incorrect format, a warning message will show advising the correct format. See the example below:





In this example, an incorrect format for the Container Number was used. The warning message recommends how to enter the number properly.

Refer to the table below to continue the Record Information data entry.

<p>4</p>	<p>Click on the Calendar Icon to select an Interception date.</p>  <p>Note: ARM will not allow users to select or enter a future date.</p> 
<p>5</p>	<p>Click on Apply</p>
<p>6</p>	<p>Click on the Calendar Icon to select a Date of Arrival.</p>  <p>Note: This is a non-required field. SKIP is this step if needed.</p>
<p>7</p>	<p>Click on Apply</p>

8	<p>Select the Importer.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">IF:</th> <th style="text-align: left;">THEN:</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Unknown</td> <td> <p>1. Click on Unknown Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select...</p> </div> <p>2. Select the Unknown Importer Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Importer Country * <input checked="" type="checkbox"/> Unknown Importer</p> <p>Select...</p> <p style="font-size: small; color: red;">This field is required.</p> </div> <p>3. Go to Step 9.</p> </td> </tr> <tr> <td style="vertical-align: top;">Known</td> <td> <p>1. Select an Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select... <input type="checkbox"/> Q</p> </div> <p>Note: If the Importer is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 9.</p> </td> </tr> </tbody> </table>	IF:	THEN:	Unknown	<p>1. Click on Unknown Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select...</p> </div> <p>2. Select the Unknown Importer Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Importer Country * <input checked="" type="checkbox"/> Unknown Importer</p> <p>Select...</p> <p style="font-size: small; color: red;">This field is required.</p> </div> <p>3. Go to Step 9.</p>	Known	<p>1. Select an Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select... <input type="checkbox"/> Q</p> </div> <p>Note: If the Importer is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 9.</p>
IF:	THEN:						
Unknown	<p>1. Click on Unknown Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select...</p> </div> <p>2. Select the Unknown Importer Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Importer Country * <input checked="" type="checkbox"/> Unknown Importer</p> <p>Select...</p> <p style="font-size: small; color: red;">This field is required.</p> </div> <p>3. Go to Step 9.</p>						
Known	<p>1. Select an Importer.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Importer * <input type="checkbox"/> Unknown Importer</p> <p>Select... <input type="checkbox"/> Q</p> </div> <p>Note: If the Importer is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 9.</p>						

9	<p>Select the Shipper.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%; text-align: left;">IF:</th> <th style="width: 50%; text-align: left;">THEN:</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Unknown</td> <td> <p>1. Click on Unknown Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select...</p> </div> <p>2. Select the Unknown Shipper Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Shipper Country * <input checked="" type="checkbox"/> Unknown Shipper</p> <p>Select...</p> <p style="color: red; font-size: small;">This field is required.</p> </div> <p>3. Go to Step 10.</p> </td> </tr> <tr> <td style="vertical-align: top;">Known</td> <td> <p>1. Select a Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select... ▼ <input type="text" value="Q"/></p> </div> <p>Note: If the Shipper is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 10.</p> </td> </tr> </tbody> </table>	IF:	THEN:	Unknown	<p>1. Click on Unknown Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select...</p> </div> <p>2. Select the Unknown Shipper Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Shipper Country * <input checked="" type="checkbox"/> Unknown Shipper</p> <p>Select...</p> <p style="color: red; font-size: small;">This field is required.</p> </div> <p>3. Go to Step 10.</p>	Known	<p>1. Select a Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select... ▼ <input type="text" value="Q"/></p> </div> <p>Note: If the Shipper is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 10.</p>
IF:	THEN:						
Unknown	<p>1. Click on Unknown Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select...</p> </div> <p>2. Select the Unknown Shipper Country.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Unknown Shipper Country * <input checked="" type="checkbox"/> Unknown Shipper</p> <p>Select...</p> <p style="color: red; font-size: small;">This field is required.</p> </div> <p>3. Go to Step 10.</p>						
Known	<p>1. Select a Shipper.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Shipper * <input type="checkbox"/> Unknown Shipper</p> <p>Select... ▼ <input type="text" value="Q"/></p> </div> <p>Note: If the Shipper is not found in the dropdown list, users can search or add them. Refer to the Search, Add, and Edit a Trade Party Job Aid for steps to complete this task.</p> <p>2. Go to Step 10.</p>						

10	Select a Broker.	
	IF:	THEN:
	<p><u>Not</u> on the dropdown list</p>	<p>1. Click on Search.</p>  <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 11 after adding a Broker.</p>
	<p>On the dropdown list</p>	<p>1. Select a Broker.</p>  <p>2. Go to Step 11.</p>
<p>Note: This is a non-required field. SKIP this step if needed.</p>		

11	<p>Select the Consignee/Owner.</p> <table border="1" data-bbox="293 283 1386 1062"> <thead> <tr> <th data-bbox="293 283 732 346">IF:</th> <th data-bbox="732 283 1386 346">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="293 346 732 768"> <p>Not on the dropdown list</p> </td> <td data-bbox="732 346 1386 768"> <p>1. Click on Search.</p> <div data-bbox="773 474 1321 548" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 12 after adding a Consignee.</p> </td> </tr> <tr> <td data-bbox="293 768 732 1062"> <p>On the dropdown list</p> </td> <td data-bbox="732 768 1386 1062"> <p>1. Select a Consignee.</p> <div data-bbox="773 873 1354 951" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Go to Step 12.</p> </td> </tr> </tbody> </table>	IF:	THEN:	<p>Not on the dropdown list</p>	<p>1. Click on Search.</p> <div data-bbox="773 474 1321 548" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 12 after adding a Consignee.</p>	<p>On the dropdown list</p>	<p>1. Select a Consignee.</p> <div data-bbox="773 873 1354 951" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Go to Step 12.</p>
IF:	THEN:						
<p>Not on the dropdown list</p>	<p>1. Click on Search.</p> <div data-bbox="773 474 1321 548" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 12 after adding a Consignee.</p>						
<p>On the dropdown list</p>	<p>1. Select a Consignee.</p> <div data-bbox="773 873 1354 951" style="border: 1px solid black; padding: 5px;"> <p>Consignee/Owner *</p> <p>Select... q</p> </div> <p>2. Go to Step 12.</p>						
12	<p>Type the Port of Lading.</p> <div data-bbox="293 1167 696 1272" style="border: 1px solid black; padding: 5px;"> <p>Port of Lading</p> <input style="width: 100%; height: 20px;" type="text"/> </div> <p>Note: This is a non-required field. SKIP this step if needed.</p>						

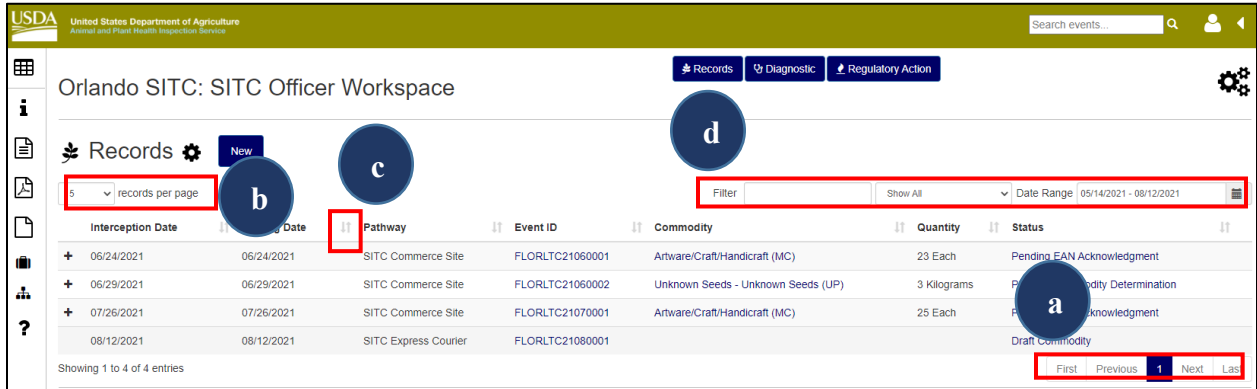
13	<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">IF THE PATHWAY IS:</th> <th style="text-align: left;">THEN:</th> </tr> </thead> <tbody> <tr> <td>SITC Express Courier</td> <td> <p>1. Select the Incoming Courier Name from the Dropdown list.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Incoming Courier Name *</p> <p>Select... ▼</p> <p>Select...</p> <p>DHL</p> <p>EMS</p> <p>FedEx</p> <p>Other</p> <p>Purolator</p> <p>TNT</p> <p>UPS</p> <p>World Courier</p> </div> <p>2. Go to Step 14.</p> </td> </tr> <tr> <td>SITC Commerce Site</td> <td> <p>1. Go to Step 14.</p> </td> </tr> </tbody> </table>	IF THE PATHWAY IS:	THEN:	SITC Express Courier	<p>1. Select the Incoming Courier Name from the Dropdown list.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Incoming Courier Name *</p> <p>Select... ▼</p> <p>Select...</p> <p>DHL</p> <p>EMS</p> <p>FedEx</p> <p>Other</p> <p>Purolator</p> <p>TNT</p> <p>UPS</p> <p>World Courier</p> </div> <p>2. Go to Step 14.</p>	SITC Commerce Site	<p>1. Go to Step 14.</p>
IF THE PATHWAY IS:	THEN:						
SITC Express Courier	<p>1. Select the Incoming Courier Name from the Dropdown list.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Incoming Courier Name *</p> <p>Select... ▼</p> <p>Select...</p> <p>DHL</p> <p>EMS</p> <p>FedEx</p> <p>Other</p> <p>Purolator</p> <p>TNT</p> <p>UPS</p> <p>World Courier</p> </div> <p>2. Go to Step 14.</p>						
SITC Commerce Site	<p>1. Go to Step 14.</p>						
14	<p>Select the current location of the commodity.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">IF:</th> <th style="text-align: left;">THEN:</th> </tr> </thead> <tbody> <tr> <td><u>Not</u> on the dropdown list</td> <td> <p>1. Click on Search.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <p>Select... Q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 15.</p> </td> </tr> <tr> <td>On the dropdown list</td> <td> <p>1. Select a Location.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <div style="border: 2px solid red; padding: 2px;"> <p>Select... ▼ Q</p> </div> </div> <p>2. Go to Step 15.</p> </td> </tr> </tbody> </table> <p>Note: This is a non-required field. SKIP this step if needed.</p>	IF:	THEN:	<u>Not</u> on the dropdown list	<p>1. Click on Search.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <p>Select... Q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 15.</p>	On the dropdown list	<p>1. Select a Location.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <div style="border: 2px solid red; padding: 2px;"> <p>Select... ▼ Q</p> </div> </div> <p>2. Go to Step 15.</p>
IF:	THEN:						
<u>Not</u> on the dropdown list	<p>1. Click on Search.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <p>Select... Q</p> </div> <p>2. Refer to User Guide: Search, Add, and Update Trade Party information in ARM.</p> <p>3. Go to Step 15.</p>						
On the dropdown list	<p>1. Select a Location.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Current Location of Commodity</p> <div style="border: 2px solid red; padding: 2px;"> <p>Select... ▼ Q</p> </div> </div> <p>2. Go to Step 15.</p>						

15	IF:	THEN:
	Saving the data	Click on Save
	Not saving the data	Click on Commodity

Note: ARM will auto-save all data entered in the Inspection Information Page when clicking on the Commodity tab.

3. Access Draft Records

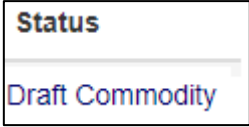
A Draft Record is a record that was saved with only the Record Information data entered. Users may access a Draft Record to update any information or continue the workflow. Once in the SITC Workspace, users can search for a Draft Record in different ways:



- a- First, Previous, Next, Last Buttons
- b- Records per Page
- c- Sorting Icons
- d- Filter

For more information on how to search a record using these fields; refer to **User Guide: Navigating Common Fields in ARM Plant Inspection Station Plant Health Safeguarding Specialist Workspace Panes.**

Once the record is located, click on the status column hyperlink. This status must be in

“Draft Commodity”  to access the Record Information page.